

WHAT IS CLAIMED IS:

1. A financial asset manager peer group information dissemination method comprising:

accessing a database;

5 entering asset manager data in a section of an asset manager questionnaire, the asset manager questionnaire including a plurality of sections;

sorting, in the database, entered asset manager data from the questionnaire;

comparing asset manager data with data of at least another asset manager; and

10 generating a manager report of the compared data corresponding to the plurality of sections for the asset manager and the at least another asset manager.

2. The method of claim 1, further comprising displaying, in the manager report, at least one of median, smallest and largest value of the compared data for at least one section of the plurality of sections for the asset manager and the at least another asset manager.

15 3. The method of claim 1, further comprising displaying a comparison, in the manager report, of the compared data for at least one section of the plurality of sections.

4. The method of claim 1, wherein the manager report is configured to be exported into a spreadsheet program.

5. The method of claim 1, further comprising:

downloading the electronic asset manager questionnaire from the database; and

uploading, to a database, the asset manager questionnaire including entered asset manager data;

5 wherein said entering asset manager data occurs in the downloaded questionnaire.

6. The method of claim 1, wherein the sections of the questionnaire comprise at least one of organization information, products managed by the asset manager, and product details.

7. The method of claim 6, further comprising displaying a comparison, in the
10 manager report, of at least one of organization information, products, and product details of the asset manager and the at least another asset manager.

8. The method of claim 7, further comprising displaying a comparison, in the manager report, of at least one of performance, risk measures, fees and volume of the asset manager's and the at least another asset manager's respective products.

15 9. The method of claim 6, further comprising displaying, in the manager report, information on the asset manager's and the at least another asset manager's respective assets under management, active portfolio volume, number of accounts active, passive portfolio volume, number of passive accounts, and preferences for a product custodian.

10. The method of claim 6, wherein the product section includes at least one category, the at least one category being one of equity bonds, hedge funds and commodities.

11. The method of claim 10, wherein the at least one category of the product section includes at least one subcategory being one of growth, value, and growth at a reasonable price (GARP).

12. The method of claim 6, wherein the product details section includes at least one category being one of product specification, assets under management, responsible portfolio manager, account size and cost, investment team, investment philosophy, reference list, management style, decision factors, actively steered parameters, approach for passive products, expected results, historic results, and performance data and standards.

13. The method of claim 11, further comprising:

entering, by an investor, data corresponding to a plurality of investor preferences corresponding to at least one of the plurality of categories and subcategories;

entering, by the investor, data corresponding to criteria including at least one of historical performance, historical low standard deviation, historical high standard deviation, historical performance/standard deviation, low tracking error in original currency, low tracking error in chosen currency, high tracking error in original currency, high tracking error in chosen currency, low information ratio in original currency, low information ratio in chosen currency, high information ratio in original currency, high information ratio in chosen

currency, low alpha in original currency, low alpha in chosen currency, high alpha in original
currency, high alpha in chosen currency, low beta in original currency, low beta in chosen
currency, high beta in original currency, high beta in chosen currency, and fees;

matching the data corresponding to the entered plurality of investor preferences and
5 the entered criteria with asset manager data and data entered by the at least another asset
manager; and

generating an investor report based on the matched data, the investor report including
a code corresponding to the asset manager and the at least another asset manager, wherein
the investor is not informed of the identity of the asset manager and the at least another asset
10 manager.

14. The method of claim 13, further comprising generating a manager feedback
analysis report including factors determined important by the investor, based on feedback
given by the investor.

15. The method of claim 14, wherein the factors include at least one of
15 quantitative factors, qualitative factors, and data quality.

16. A financial asset manager peer group information dissemination system
comprising:

a database;

an asset manager questionnaire including a plurality of sections, said asset manager questionnaire configured to accept asset manager data in at least one section of said plurality of sections;

5 a sorter that sorts, in said database, accepted asset manager data from said questionnaire;

a comparer that compares asset manager data with data of at least another asset manager; and

a manager report including compared data corresponding to said plurality of sections for the asset manager and the at least another asset manager.

10 17. The system of claim 16, wherein said manager report further comprises at least one of median, smallest and largest value of the compared data for at least one section of said plurality of sections for the asset manager and the at least another asset manager.

18. The system of claim 16, wherein said manager report further comprises a comparison of the compared data for at least one section of said plurality of sections.

15 19. The system of claim 16, wherein said manager report is configured to be exported into a spreadsheet program.

20. The system of claim 16, wherein:

said questionnaire is configured to be downloaded from said database; and

said database is configured to accept uploaded said asset manager questionnaires including accepted asset manager data;

wherein the acceptance of asset manager data occurs in said downloaded questionnaire.

5 21. The system of claim 16, wherein said sections of said questionnaire comprise at least one of organization information, products managed by the asset manager, and product details.

10 22. The system of claim 21, wherein said manager report further comprises a comparison of at least one of organization information, products, and product details of the asset manager and the at least another asset manager.

15 23. The system of claim 22, wherein said manager report further comprises a comparison of at least one of performance, risk measures, fees and volume of the asset manager's and the at least another asset manager's respective products.

20 24. The system of claim 21, wherein said manager report further comprises information on the asset manager's and the at least another asset manager's respective assets under management, active portfolio volume, number of accounts active, passive portfolio volume, number of passive accounts, and preferences for a product custodian.

25 25. The system of claim 21, wherein said product section includes at least one category, said at least one category being one of equity bonds, hedge funds and commodities.

26. The system of claim 25, wherein said at least one category of said product section includes at least one subcategory being one of growth, value, and growth at a reasonable price (GARP).

27. The system of claim 21, wherein said product details section includes at least one category being one of product specification, assets under management, responsible portfolio manager, account size and cost, investment team, investment philosophy, reference list, management style, decision factors, actively steered parameters, approach for passive products, expected results, historic results, and performance data and standards.

28. The system of claim 26, wherein:

said database further comprises:

A) a first acceptor that accepts first data entered by an investor, the first data corresponding to a plurality of investor preferences corresponding to at least one of said plurality of categories and subcategories;

B) a second acceptor that accepts second data entered by an investor, the second data corresponding to criteria including at least one of historical performance, historical low standard deviation, historical high standard deviation, historical performance/standard deviation, low tracking error in original currency, low tracking error in chosen currency, high tracking error in original currency, high tracking error in chosen currency, low information ratio in original currency, low information ratio

in chosen currency, high information ratio in original currency, high information ratio
in chosen currency, low alpha in original currency, low alpha in chosen currency,
high alpha in original currency, high alpha in chosen currency, low beta in original
currency, low beta in chosen currency, high beta in original currency, high beta in
5 chosen currency, and fees; and

C) a matcher that matches the first data corresponding to the entered plurality of
investor preferences and the second data corresponding to entered criteria with asset
manager data and data entered by the at least another asset manager;

wherein said system further comprises an investor report based on the matched data,
10 said investor report including a code corresponding to the asset manager and the at least
another asset manager, wherein the investor is not informed of the identity of the asset
manager and the at least another asset manager.

29. The system of claim 28, further comprising a manager feedback analysis
report including factors determined important by the investor, based on feedback given by
15 the investor.

30. The system of claim 29, wherein said factors include at least one of
quantitative factors, qualitative factors, and data quality.

31. A computer readable medium for disseminating financial asset manager peer
group information over a network, the medium comprising:

P19862.S04

a system for accessing a database;

an asset manager questionnaire including a plurality of sections, said asset manager questionnaire configured to accept asset manager data in a said section;

a sorter that sorts, in the database, accepted asset manager data from said questionnaire;

a system that compares asset manager data with data of at least another asset manager; and

a manager report including compared data corresponding to said plurality of sections for the asset manager and the at least another asset manager.

32. The medium of claim 31, wherein said manager report further comprises at least one of median, smallest and largest value of the compared data for at least one section of said plurality of sections for the asset manager and the at least another asset manager.

33. The medium of claim 31, wherein said manager report further comprises a comparison of the compared data for at least one section of said plurality of sections.

34. The medium of claim 31, wherein said manager report is configured to be exported into a spreadsheet program.

35. The medium of claim 31, wherein:

said questionnaire is configured to be downloaded from the database; and

the database is configured to accept uploaded said asset manager questionnaires including accepted asset manager data;

wherein the acceptance of asset manager data occurs in said downloaded questionnaire.

5 36. The medium of claim 31, wherein said sections of said questionnaire comprise at least one of organization information, products managed by the asset manager, and product details.

10 37. The medium of claim 36, wherein said manager report further comprises a comparison of at least one of organization information, products, and product details of the asset manager and the at least another asset manager.

38. The medium of claim 37, wherein said manager report further comprises a comparison of at least one of performance, risk measures, fees and volume of the asset manager's and the at least another asset manager's respective products.

15 39. The medium of claim 36, wherein said manager report further comprises information on the asset manager's and the at least another asset manager's respective assets under management, active portfolio volume, number of accounts active, passive portfolio volume, number of passive accounts, and preferences for a product custodian.

40. The medium of claim 36, wherein said product section includes at least one category, said at least one category being one of equity bonds, hedge funds and commodities.

41. The medium of claim 40, wherein said at least one category of said product section includes at least one subcategory being one of growth, value, and growth at a reasonable price (GARP).

42. The medium of claim 36, wherein said product details section includes at least one category being one of product specification, assets under management, responsible portfolio manager, account size and cost, investment team, investment philosophy, reference list, management style, decision factors, actively steered parameters, approach for passive products, expected results, historic results, and performance data and standards.

43. The medium of claim 41, wherein:

the database further comprises:

A) a first acceptor that accepts first data entered by an investor, the first data corresponding to a plurality of investor preferences corresponding to at least one of said plurality of categories and subcategories;

B) a second acceptor that accepts second data entered by an investor, the second data corresponding to criteria including at least one of historical performance, historical low standard deviation, historical high standard deviation, historical performance/standard deviation, low tracking error in original currency, low tracking error in chosen currency, high tracking error in original currency, high tracking error in chosen currency, low information ratio in original currency, low information ratio

P19862.S04

in chosen currency, high information ratio in original currency, high information ratio
in chosen currency, low alpha in original currency, low alpha in chosen currency,
high alpha in original currency, high alpha in chosen currency, low beta in original
currency, low beta in chosen currency, high beta in original currency, high beta in
5 chosen currency, and fees; and

C) a system that matches the first data corresponding to the entered plurality of
investor preferences and the second data corresponding to entered criteria with asset
manager data and data entered by the at least another asset manager;

wherein said medium further comprises an investor report based on the matched data,
10 said investor report including a code corresponding to the asset manager and the at least
another asset manager, wherein the investor is not informed of the identity of the asset
manager and the at least another asset manager.

44. The medium of claim 43, further comprising a manager feedback analysis
report including factors determined important by the investor, based on feedback given by
15 the investor.

45. The medium of claim 44, wherein said factors include at least one of
quantitative factors, qualitative factors, and data quality.